Final report

JBS Digital value chain strategy development and Digital Marketing Manager
[Public Report]

Project code:	P.PSH.1158
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Abstract

JBS Australia is developing expertise and resources to enhance digital capability, specifically through the provision of advanced analytics of datasets in order to gain new insights for the business. The goal of the current Digital Marketing Manager project was to analyse the value in linking existing and new company data with other data sets and mining the data in order to generate value and new opportunities.

The primary focus of the Digital Marketing Manager role was the implementation of the agreed JBS/MLA Digital Strategy across the JBS's business. It is anticipated that this Digital Marketing Manager would focus particularly on managing on the JBS digital priorities and will also co-ordinate the livestock production focus areas of the Digital Strategy.

The project was successfully completed with the following deliverables being achieved:
- Finalise position description & commence recruitment.
- Recruitment of the Digital Marketing Manager.
- Company / MLA steering committee formed. Initial steering committee meeting completed (10 April 2019).
- Set overarching goals, metrics and outline (to be presented to the Project steering group for input and signoff) with consideration of data availability, metrics and resource planning for digital portfolio.
- Digital Marketing Manager commenced the development of a framework and processes for implementation of red meat digital strategies & R&D projects portfolio.
- A primary focus of the role to date has been development of the Customer Connect system (one component of the overall JBS Digital Strategy).
- A draft JBS & MLA collaborative digital marketing strategy has commenced, with ongoing input required from the project steering group.
- Developed a Learning & Development plan for Digital Marketing Manager (Matthew Zorzetto).
- Participated in internal and external networks to accelerate outcomes. Various workshops and consultants were engaged to accelerate outcomes for each project.
- Participated in internal and external networks to accelerate outcomes (including the Co-Innovation & Digital / Supply Chain managers networking events. JBS digital marketing manager officer attended and actively participated in various ISC-MLA "Supply Chain & Digital Value Chain Officer Workshop" and MLA Co-innovation forums – [See agenda in Appendix, Section 7.3].
- Steering group consisting of JBS and MLA including MLA ISC is formed. Actioned steering committee tasks.
- JBS has continued to make significant progress in the development of digital marketing strategy & business systems.
- A draft digital marketing strategy including priorities has commenced with ongoing input required by steering group approval. A number of R&D opportunities have been identified and implemented to enhance JBS's capability.

A key focus of the project for JBS was developing the King Island Beef traceability system to support the proof of authenticity of locally sourced King Island beef. An article on Beef Central that was published 28 October 2019, outlines JBS's plans to launch a traceability system for one of their signature brands. This was one key initiative to enable JBS to connect with their customers and potentially end users in the supply chain. This will be further piloted and optimised in the next proposed phase.

Executive summary

Background

JBS Australia is developing expertise and resources to enhance digital capability, specifically through the provision of advanced analytics of datasets in order to gain new insights for the business. The goal of the current Digital Marketing Manager project was to analyse the value in linking existing and new company data with other data sets and mining the data in order to generate value and new opportunities. The primary focus of the Digital Marketing Manager role is the implementation of the agreed JBS/MLA Digital Strategy across the JBS's business.

Objectives

The overall objective of this work was to develop a digital strategy and evaluate the feasibility and commercial options of data capture, management and analytics across the businesses. The primary goal was to provide support in the form a dedicated Digital Marketing Manager resource to deliver a data capture and analytics processes to allow the Australian Meat and Livestock Industry to define the various processes and required metrics for running red meat value adding production facilities through to the (domestic and export) customer.

Methodology

The initial phase involved recruitment and engagement of a full-time employee.   A suitable candidate was outsourced from the business with the required skills and capabilities new to JBS's market insights team, to develop and implement JBS's digital marketing strategy. It also considered data availability, metrics and resource planning for digital portfolio over a staged 12 quarter reporting process.

Results/key findings

The program was considered successful by providing a catalyst to fast-track digital innovation capability within JBS, namely:
- Recruitment and lines of reporting to enhance practice change
- Developing a data culture
- Building trust in company's data to make decision
- Networks delivering benefits by accelerating uptake of new methods

The primary challenge has been the change management process, and getting people in the company to trust, understand and use these new approaches.

Benefits to industry

The Digital Marketing Strategy role demonstrated supporting the delivery of impact for industry in this focus area by assisting to increase the efficiency with which data is collected, integrated, analysed and presented for use to decision makers across the supply chain. The co-funded roles have contributed toward achievement of a range of key outputs (products) and their value propositions, including:
- Economic benefits
- Environmental/sustainability benefits
- Socialised benefits

Independent reviews

An evaluation of the baseline innovation capability was commenced in the current quarter with a JBS workshop (in November 2018) including a series of interviews and follow up exercises at the JBS offices. There is an opportunity for individuals who have successful influenced an idea to reality, and opportunity for JBS to participate in the Innovation Rewards & Recognition program and recognise those involved in innovation. The outcomes of the innovation evaluation (an industry funded project) will be presented once other evaluations are completed later in the year.

An independent evaluation of the JBS Co-innovation program (including JBS digital marketing strategy) has now been completed with a summary captured in the interview notes. An innovation rewards story board, which will be used third party accreditation of innovation credentials, is now under development.

JBS is a long-term partner with the MLA Co-Innovation Program commencing in 2009 and completing three stages to 2019.

The primary objectives of the engagement were:
- Process efficiency
- Productivity gains
- Safety improvement
- Yield improvement.

An additional independent third-party evaluation of the co-funded supply chain and digital capabilities programs was commissioned by ISC in 2021 (project V.ISC.1933). A summary of the findings related to the JBS Digital strategy:
- Supported development of a King Island Beef brand traceability system to support the proof of authenticity of locally sourced King Island beef.
- Tailoring an off the shelf enterprise brand management platform to house all of the company's brand assets online and enable JBS customers to use the platform to access and tailor these brand assets for their own marketing activities.
- Supporting customers to develop or revise ecommerce trading platforms to increase sales and demand for JBS products.
- Role in driving a JBS project alongside AMPC and Bondi Labs to test a set of smart glasses (Realwear SMT-1) to determine the feasibility of a range of use cases that will provide benefit to JBS through potential cost-savings,
- Establishment of a strong social media presence for JBS through the aussiebeef communication platforms.
- A key role in informing and upskilling other company staff, particularly in the sales and marketing teams, around digital marketing tools and techniques, and has also supported the digital capability of JBS customers via support provided for development of ecommerce solutions and brand marketing and activities.

Future research and recommendations

There was an opportunity to update JBS digital marketing manager and JBS brand category team on market insights and category growth drivers. Targeted opportunities that are underpinned by insights is proposed to be presented to JBS category team over a series of presentations. MLA proposes a series of steps and timelines for JBS/ MLA to work through this process. If JBS's provides MLA the required data, MLA's Insights team will analyse the numbers and present the finding back to JBS's market category team. A proposed timetable (subject to JBS availability) is scheduled over the next 6 months.

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1. Project background, scope and purpose

1.1 Project background

JBS Australia is currently reviewing and evaluating options to integrate their data capture and analytical capabilities aligned with their data transfer needs. The purpose of the proposed project was to provide resourcing to develop and deliver data management and analytics solutions and build on current capabilities in data capture, management and analysts to allow JBS to define the various processes, technologies and required metrics for optimal running of meat and livestock value chains at best practice levels.   It was proposed that a Digital Marketing Manager be deployed to develop and implement JBS's digital strategy. The Digital Marketing Manager was responsible for management and implementation of all digital initiatives undertaken over the initial three years. The role involved measuring and reporting business improvements and profitability in processing at JBS to forecast more profitable business outcomes ahead of time as a result of implementing digital processes and associated business metrics. It was expected that this one of several case studies required to demonstrate the digital strategies effectively to be adopted widely across beef and lamb production enterprises.

This project was designed to inform the digital strategy for the JBS's supply chain. It provided an invaluable case study for the remainder of industry. The process, tools and material developed would become available for use in the wider industry. Industry will also be able to access tools and extension materials developed in the project for testing and verification. Critically, this project was an enabler to create impact through the adoption of (producer) feedback, which will help drive similar models across industry.

1.2 Digital Marketing Manager - Roles & responsibilities

The primary focus of the Digital Marketing Manager role was the implementation of the agreed JBS/MLA Digital Strategy across the JBS's business. It was anticipated that this Digital Marketing Manager would focus particularly on managing on the JBS digital priorities and will also co-ordinate the livestock production focus areas of the Digital Strategy.

The major activities to be undertaken by the full-time Digital Marketing Manager included:
- Facilitate the development of a comprehensive JBS Digital Strategy across the key business areas.
- Assist in developing and monitoring key performance indicators and other measures of impact as agreed.
- Manage innovation idea generation and filtering and feedback processes with a specific focus on data capture, management and analytics.
- Develop and co-ordinate an agreed suite of R&D/innovation projects related to the digital strategy and priorities.
- Manage and monitor the JBS's innovation portfolio to manage expenditure and track benefits from outcomes generated from JBS R&D/innovation projects and activities.
- Participate in the development and implementation of JBS's innovation skills and resources plan.
- External relationship management as appropriate.
- Participate in innovation skills development activities as agreed.
- Prepare regular project reports and quarterly innovation reports.

Ongoing support for this role by MLA was dependent on:

- There was clear evidence that the role is a dedicated full-time Digital Marketing Manager role who was delivering company and industry benefit.

- The joint JBS/MLA Steering Group was satisfied with progress and agrees to continue the program at each of the annual go/no go decision points.

The Digital Marketing Manager had satisfactorily undertaken the full range of activities as described above (or as varied and agreed by JBS and MLA). It provided an invaluable case study for the remainder of industry. The process, tools and material developed would become available for use in the wider industry. Industry will also be able to feed into this project tools and extension materials for testing and verification. Critically, this project allowed for the impact of the adoption of feedback to be quantified, which will help drive similar models across industry.

1.3 Purpose and description

The purpose of the project was to develop and implement JBS's digital strategy across the business with a specific focus on livestock production, procurement and movements. This was designed to manage through the provision of new data capture and storage methods and advanced data analytics to generate new insights for the business, including:

- Enhance existing production management reports to provide feedback to JBS value chain from properties, primary processors through to customer.
- Evaluate feasibility of collecting data and reporting on other issues that could affect yield and grading outcomes.
- Review current production managements systems and how they can evolve to use feedback from processors.
- Identify relevant external tools and systems and implement in the supply chain as required.
- Evaluate data management processes and systems using various data management tools to capture and collect data to improve animal performance.

The contribution of the JBS Digital Marketing Manager to the overall success of the Digital Strategy was determined by:

- Evidence of effective implementation of JBS Digital strategy in agreed areas.
- Evidence of improvement in company innovation culture and capability.
- Quantifiable improvements in company innovation measures (as agreed).
- Efficient project delivery in accordance with budgets and timelines.
- Quality of reports.
- Contribution to Digital Managers/ Officers' Network meetings / events.

2. Objectives

The overall objective of this work was to develop a digital strategy and evaluate the feasibility and commercial options of data capture, management and analytics across the businesses. The primary goal was to provide support in the form a dedicated Digital Marketing Manager resource to deliver a data capture and analytics processes to allow the Australian Meat and Livestock Industry to define the various processes and required metrics for running red meat value adding production facilities through to the (domestic and export) customer.

Specific objectives of the project in providing a dedicated Digital Marketing Manager role included (but not exclusive):

- Detailed data capture and management mapping exercise of JBS using existing evaluation tools developed by various providers.
- Identify gaps in existing capabilities and capacities in data capture and management.
- Design and develop a cloud based (accessible) system that accommodates diverse data sources and formats.
- Evaluation of greater insights into market demand and supply, pricing trends, consumer trends.
- Evaluation of the outcomes of the production pilot data management system and extrapolation across the value chain.
- Design and develop a cloud based (accessible) system that accommodates diverse data sources and formats in real time.
- Advise on a series of identified new data sensing devices and analytics to fill current production data sensing gaps.
- Evaluation of the outcomes of the production data management system and extrapolation across and integrated value chain where applicable.
- Manage third party independent review of the feasibility, cost benefit and business case associated with adoption of integrated data management system for adoption across the entire value chain.

This project was expected to bring new data streams and significantly increasing its impact across the business.

3. Methodology

Digital capabilities in marketing sights were developed over a staged 12 quarter reporting process, including:

- Contract execution & commence recruitment
- Appoint a suitable candidate
- Digital program development and implementation

3.1 Contract execution & commence recruitment (Milestone 1)

Finalise position description, commence recruitment. Form Company / MLA steering committee and set overarching goals, metrics and outline. Progress report submitted to MLA for review and approval.

3.2 Appoint suitable candidate (Milestone 2)

Develop framework for development and implementation of red meat digital strategies. Define preliminary list of target digital applications. Consider data availability, metrics and resource planning for digital portfolio. Progress report including digital strategy and priorities. Complete initial Steering committee meeting and submit report to MLA of key outcomes for review and approval.

3.3 Digital program development and implementation (Milestone 3)

Digital program development and implementation. Deliver key functions such as:
- Develop strategic portfolio of digital opportunities
- Data analysis and insight generation process

- Track and report on quantifiable benefits of digital projects
- Participate in internal and external networks to accelerate outcomes
- Action steering committee tasks

Submit Quarterly Report to MLA for review and approval.
GO/NO GO DECISION. Progress to demonstrate use of digital insights in innovation portfolio; suite of activities commenced that demonstrate future increased red meat demand for JBS's operations and customer channels. Report to be submitted to JBS / MLA Steering committee. (Due 12 July 2019).

3.4 Digital program development and implementation (Milestone 4-5)

Submit Quarterly Report to MLA for review and approval, which should include details of data analysis, development of new digital and data approaches, analytical tools, application of business decision tools, skills development, and participation in digital networks.

GO/NO GO DECISION. Progress to demonstrate use of digital insights in innovation portfolio; suite of activities commenced that demonstrate future increased red meat demand for JBS's operations and customer channels. Report to be submitted to JBS / MLA Steering committee. (Due 20 December 2019).

3.5 Digital program development and implementation (Milestone 6-8)

Submit Quarterly Report to MLA for review and approval, which should include details of data analysis, development of new digital and data approaches, analytical tools, application of business decision tools, skills development, and participation in digital networks.

GO/NO GO DECISION. Progress to demonstrate use of digital insights in innovation portfolio; suite of activities commenced that demonstrate future increased red meat demand for JBS's operations and customer channels. Report to be submitted to JBS / MLA Steering committee.

3.6 Digital program development and implementation (Milestone 9-12)

Digital program development and implementation. Deliver key functions such as:
- Develop strategic portfolio of digital opportunities
- Data analysis and insight generation process
- Track and report on quantifiable benefits of digital projects.
- Participate in internal and external networks to accelerate outcomes.
- Action steering committee tasks

4. Project outcomes

The project was successfully completed with the following deliverables being achieved:
- Finalise position description & commence recruitment.
- Recruitment of the Digital Marketing Manager.
- Company / MLA steering committee formed. Initial steering committee meeting completed (10 April 2019).

- Set overarching goals, metrics and outline (to be presented to the Project steering group for input and signoff) with consideration of data availability, metrics and resource planning for digital portfolio.
- Digital Marketing Manager commenced the development of a framework and processes for implementation of red meat digital strategies & R&D projects portfolio.
- A primary focus of the role to date has been development of the Customer Connect system (one component of the overall JBS Digital Strategy).
- A draft JBS & MLA collaborative digital marketing strategy has commenced, with ongoing input required from the project steering group.
- Developed a Learning & Development plan for Digital Marketing Manager.
- Participated in internal and external networks to accelerate outcomes. Various workshops and consultants were engaged to accelerate outcomes for each project.
- Participated in internal and external networks to accelerate outcomes (including the Co-Innovation & Digital / Supply Chain managers networking events. JBS digital marketing manager officer attended and actively participated in various ISC-MLA "Supply Chain & Digital Value Chain Officer Workshop" and MLA Co-innovation forums – [See agenda in Appendix, Section 7.1].
- Steering group consisting of JBS and MLA including MLA ISC is formed. Actioned steering committee tasks.
- JBS has continued to make significant progress in the development of digital marketing strategy & business systems.
- A draft digital marketing strategy including priorities has commenced with ongoing input required by steering group approval. A number of R&D opportunities have been identified and implemented to enhance JBS's capability.

4.1 Finalise position description

Finalise position description & roles and responsibilities for JBS Northern Digital Marketing Manager.

4.2 Commence recruitment

Recruitment commenced in January 2019, after an interim trial period (3 months) with a proposed candidate (October 2018 – December 2018). At the conclusion of the trial period, it was agreed to recruit a new candidate for the position. An advertisement issued across social networks and recruitment was done through Job Seek. JBS had confirmation of a new appointment, and the new Digital Marketing Manager was appointed externally from the JBS business.

In addition, developed a Learning & Development plan for Digital Marketing Manager.

4.3 Form Company / MLA steering committee

Project steering committee group assigned including technical input from JBS & MLA. Form JBS / MLA steering committee. Steering group consisting of JBS and MLA including MLA ISC is formed. The initial steering committee meeting was completed on 10 April 2019.

JBS Digital Marketing Manager actioned steering committee tasks.

4.4 Set overarching goals, metrics and outline

There has been increasing across company engagement with the whole of JBS on a new stage innovation program, where one of the five primary focus was identified as digital. MLA and JBS have commenced discussions on expanding the JBS focus areas across the business. There was a number of planning sessions including face to face meetings with JBS senior marketing management on the products / market channels side, and also JBS's co-innovation manager on the processing / production focus area as well as other groups in JBS including JBS Southern value add. The Stage 4 draft Strategy on a Page (SOAP) is currently under development requiring ongoing input from JBS and MLA. This coincides with a business strategy and priorities initiative that JBS and EY were engaged on. From the overall JBS innovation strategy this will help refine the goals and metrics for current digital program.

4.5 Collaborative Digital Strategy

4.5.1   Digital marketing strategy – Development & implementation

A draft digital marketing strategy including priorities has commenced with ongoing input required by steering group approval. A number of R&D opportunities were identified and implemented to enhance JBS's capability.

Set overarching goals, metrics and outline.   A draft digital marketing strategy including priorities has commenced with ongoing input required by steering group approval.   A draft JBS & MLA Collaborative Digital Marketing Strategy has commenced, with ongoing input required from the project steering group.

A one-on-one engagement with the MLA Consumer and Market Insights Team (with Natalie Isaac, Global Manager of Industry and Insights) on 7 May 2019.   The meeting agenda covered:
- Introduction to MLA insights global market strategy- overview of data/ insights available
- Introduction to domestic insights
- Markets segmentation, Nielsen highlights, KMB highlights; Carmen- category drivers
- Introduction to domestic team including domestic marketing program/ calendar
- Introduction to international insights specifically share Japan and Korea
- US overview & US category drivers
- Introduction to domestic insights, Nielsen highlights, Shopper research program, KMB highlights; Category drivers.
- Introduction to international insights, Summary overview. Japan and Korea

The meeting helped with how JBS can use these MLA insights to better inform their digital strategy including:
- Where to play and which markets to focus on
- How-to-win and through which channels, and
- Implementation of this strategy

More customised one-on-one sessions on market classifications, where to play and how-to-win sessions to further focus on market opportunities, will be organised for the future.

Continue to distribute a weekly strategy piece to key internal stakeholders of cross-sectoral companies within JBS. This strategy piece aims to educate, inform and encourage discussion amongst management stakeholders of JBS business units (including JBS Northern, Southern, Primo, Swift Trade Group, Andrews Meats, DR Johnston, Knox, JBS Imports) around the greater JBS digital strategy. As part of the digital strategy development and implementation, JBS Digital Marketing manager's brief specified business units on the month-on-month performance of our digital scorecard which scores our performance of the marketing activity of the previous month.

Attended *Integrity Systems Stakeholder Forum* in North Sydney, on Thursday 8 August. The forum showcased the Integrity System Strategy – 2025 and beyond, and we heard from leading red meat and livestock industry specialists who shared the opportunities technology presents, what a future integrity system could look like and the benefits it can deliver along the supply chain. Interesting and thought-provoking discussions included topics around sharing objective carcase measurement data with producers to better build upon their breeding and genetics, block-chain technology to show provenance to overseas consumers, and technology solutions to challenges facing producers around day-to-day internet connectivity to further improve on their tech stack and data sharing.

Attended B2B marketing workshop, held in Brisbane on Thursday 29 August. The event was a workshop which explored how to build an integrated digital marketing plan for a B2B company. This was especially useful given how many marketing forums only focus on B2C plans, or are consumer-focused. The unique business that JBS operates in, at scale, makes this challenging when learning from industry experts in the marketing field.

Attended Google @ iProspect agency forum with digital marketing industry experts. This forum, which was co-presented by Google, gave significant value in establishing what requirements are needed for a fully integrated digital marketing stack, and what tech needs to talk with each other – including 'pain-points' commonly experienced within the industry and how to overcome these.

Working closely with JBS Southern division, a new traceability and provenance digital program is in development that will integrate from the JBS processing plant to the brand website, giving all points of the supply chain including consumers' full traceability of the King Island beef product. We plan on releasing this provenance traceability project in the coming months, which is a business first and very exciting marketing initiative to provide value to the business and JBS customers.

Coordinated filming of the Beef City Plant and Feedlot (Est 170) as part of the Toowoomba Regional Council local business initiative which aims to promote the region as a viable investment for agriculture, including the Meat and Livestock industry. The Beef City plant is a part of the Beef City integrated feedlot, processing and farming facility, specialising in grain fed processing. (https://www.youtube.com/watch?v=lleOgetWE-8).

Meeting with several different suppliers to investigate costings and requirements to implement these platforms for our digital portal project. The technical requirements to 'plug into' our CRM, and resources required are currently being researched.

Attended a digital marketing industry and networking event, held in Brisbane on 19 June 2019. This event featured a panel of experts where the topics "getting more metrics from meaning moments" and "social media best practice" were discussed at length. This event provided valuable insights into how other industries (in this instance Wagering, Retail, and FMCG) tackle business challenges and "how to win". (https://brisbane.networxevents.com.au/events/social-media-2019)

Integrated a data capture form within the JBS WeChat platform for new customers and end users requesting access to use our brands, which is then forwarded to the China Sales Team. We are investigating in conjunction with our WeChat agency partner new ways to build on our audience base, to further improve our supply chain visibility within the Chinese market.

Initiated the first step to building the Digital Portal Project by signing off on the scoping exercise with an external supplier (Barhead). The scoping exercise is critical in establishing the project's requirements (time to build, expected cost, resources, ongoing maintenance, first iteration go-live features and functionality). Costs and requirements can blow out significantly if an adequate and comprehensive scoping of the project is not completed in the initial stages of the project. Proposed deliverables from this scoping exercise will include a high-level solution design for phase 1, as well as indicative implementation timescales and 'order of magnitude'

implementation costs. Numerous internal stakeholders including upper management across numerous business units at JBS will be involved in the workshops and discussions as part of the scoping exercise, and JBS's Digital Marketing Manager will be leading this business improvement initiative.

JBS Northern Operations was provided the opportunity to participate in collaborative "Future Food's Global Markets and Investor Readiness, 2020 cohort" program between Meat and Livestock Australia and Brisbane Marketing. The 6-day Global Markets & Investor Readiness program was attended by two senior members of JBS's marketing team in March-April 2020. Due to Covid disruptions, the program had to be completed remotely for the final three sessions.

4.5.2   JBS King Island Traceability Project

JBS has launched (December 2019) a paddock-to-primals traceability system for one of its signature beef brands. The project links individual beef producers back in the paddock with consumers and end-customers in a way not previously seen at any significant scale in the Australian beef industry.

JBS Australia's Southern has implemented the scheme as the first of its kind on any significant scale, linking individual beef producers with consumers at retail and food service/restaurant level (ie. Individual cuts traceability to underpin JBS's refreshed King Island beef brand (Source: [Beef Central link](#)). Refer to Beef central article (October, 28, 2019).

4.5.3   JBS Consumer Connect & Digital Web Portal - Discovery and Scoping

JBS Australia is seeking to gain improved visibility and a clearer understanding of the supply chain to generate improved loyalty and visibility of product adoption. To this end, JBS are looking into the capabilities offered by customer portals, and have identified a set of high priority (Phase 1) functionality that this solution would support. These are outlined in the document 'Briefing Document Digital Web Portal. The key outcomes that JBS require, are:

- A proposed high-level solution-design for the Digital Web Portal;
- An evaluation of the functionality that this solution would support;
- An indicative timeline for implementing the defined solution;
- An indicative (order of magnitude) costing for implementing this solution

To achieve these outcomes, Barhead is proposing an initial Discovery and Scoping engagement with JBS.   The Digital Web Portal Scoping Playback session from Barhead + Solution Design was conducted February 2020.

The primary services provided were scoping and Discovery workshops and meetings. A Barhead Senior Consultant will run scoping and discovery workshops over a two-week period, covering the following topics. Where necessary these workshops will be supported by other Barhead resources, including Business Analysts and/or Solution Architects:

i)   Customer Profile update
- Understand the existing D365 CRM platform, including technical implementation and business processes that it supports;
- Target customer experience, branding and functionality for customers to directly access and update their customer profile.

ii)   Transactional Data Visibility
- Target functionality – what transactional data should be accessible

through the Portal (e.g. Orders, including shipping updates, Invoices);
- Location and structure of the required data;
- Any integration requirements – e.g. with Food Trader platform.

iii) Merchandise Shop
- Target shopping experience and products to be offered;
- Existing technologies, integration requirements and preferred technology partners / eCommerce platforms;
- Branding / brand filtering requirements.

iv) Digital Asset Management (for assets to be made available to customers)
- Scope and types of assets – e.g. brand logos, style guides, FAQ sheet, images, product, tasting notes/waiter guides/menu wordings, downloadable videos, pre-made social media post scripting;
- Branding / brand filtering requirements.

v) Co-marketing application process
- Application and approval process for direct and indirect customers to request co-marketing funding

vi) Future Phase Requirements
- JBS have identified a range of 'future phase requirements'. Discovery sessions will be facilitated on these, to enable their evaluation against the proposed solution design.

The deliverables for this project were:

- Summary of Scoping and Discovery Workshop outcomes in PPT presentation

- High Level Solution Design for Phase 1 of the Digital Web Portal and commentary on implications on Future Phase Requirements (See Figure 1)

- Indicative implementation timescales and 'order of magnitude' implementation costs

The key outcomes of the JBS Digital Web Portal (JBS DWP) scoping exercise, completed in February 2020, included:

- Currently JBS only fully understands where approximately 10% of its meat products go in the supply chain once the product has been sold to its customers. Greater visibility is required to better understand the reach, market penetration and demand for its brands, as well as generate net-new growth.

- By implementing a Power Portal & Dynamics Marketing - integrated with Red Meat CRM – JBS can achieve:

- Greater visibility and clearer understanding of the JBS supply chain (downstream post-customer), generating loyalty with and providing more value to our customers.

- Capturing customer and end user data into CRM when requesting merchandise, co-branded marketing collateral and co-funding marketing requests.

- Achieve operating efficiency and reduce ongoing material costs.

- Increase brand-awareness, demand, and drive enquiries from new leads

Note: There is a core dependency and assumption that the Red Meat CRM implementation will be complete before commencing the Digital Web Portal project.
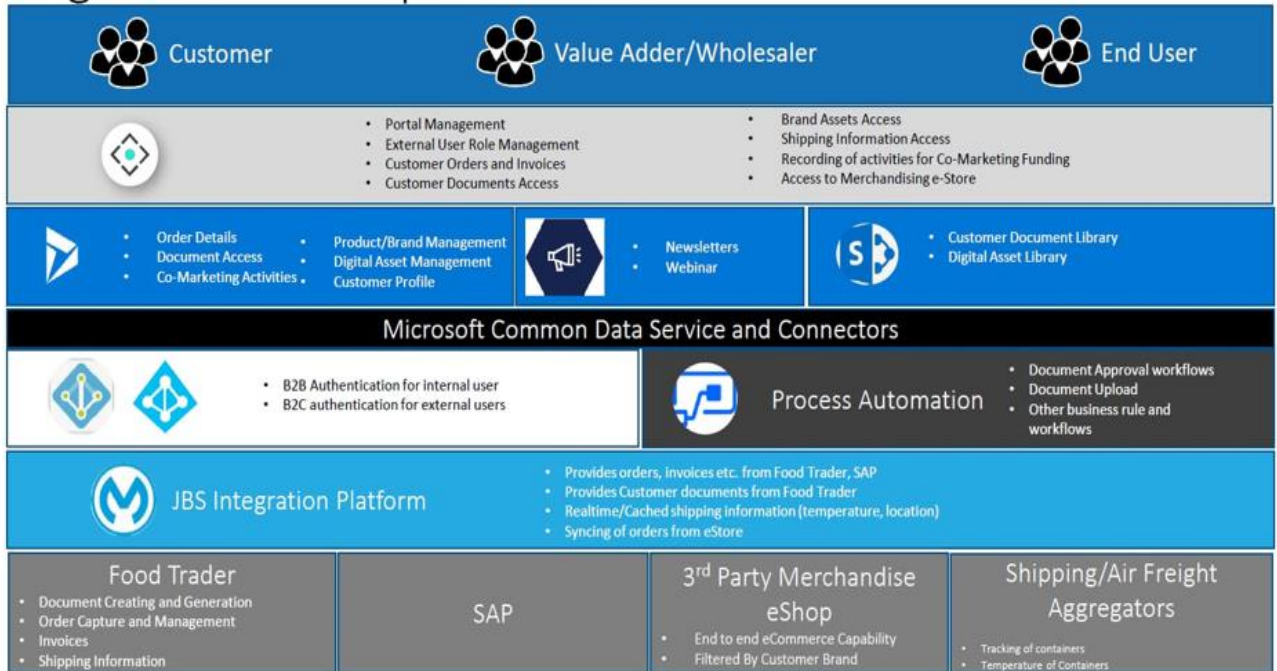

Figure 1. Target state conceptual model for JBS Customer Connect.

4.5.4   Outfit Digital Web Portal Demo to JBS

Introduction to the Outfit platform solution was demonstrated to JBS by the provider in May 2020 (See Figures 2, 3).

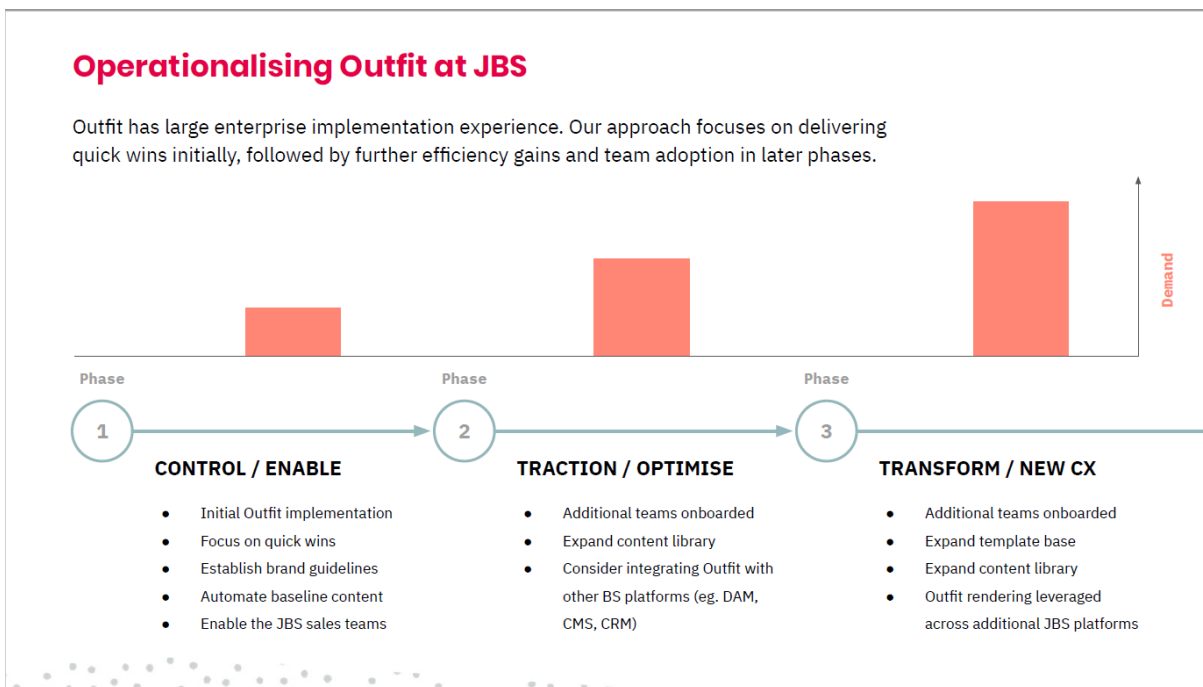**Figure 2.** Introduction to the Outfit solution.

Figure 3. Outfit commercial proposal for JBS Digital Web portal solution.

4.5.5   Abacusbio (feedlot) optimisation tool

i)   Proposition & purpose

As part of the JBS/MLA co-innovation digital value chain strategy a review of the business feedlot data capture and performance management tools has been conducted. This has highlighted an opportunity to implement a number of improvements to the tool that will improve the utilisation of input data and increase the efficiency of the feedlot business. The below project is designed to develop and deliver data management and analytics solutions and build on current capabilities in data capture, management and analysts to allow JBS to improve its technologies for optimal running of its feedlot business.

ii)   Background:

JBS Australia currently utilises in house data tools to calculate the profitability of cattle entering JBS feedlots through assessment of various kill programs, rations, time on feed, and freight calculations. The existing tools have been in place since 2013 with a recode in 2017. As the business continues to increase in complexity with increasing number of dedicated feed programs (ie China) to meet the need of changing global customer there is a need to improve the tools capability to manage this increasing complexity with in the business and to update the software to improve the overall efficiency of the tool to maximise profits in the feedlot business.

iii)   Project scope

The project will review data capture, user interface and entry parameters to determine optimisation requirements:

- Streamline 2017 recodes to improve and remove non-essential calculations
- Increase capability to access and review different lines of cattle to meet customer programs
- Optimise carcass weight and quality attributes calculation to map vendor cattle to best outcome customer programs
- Update the software application to improve user interface, data collection, speed up the run time and implement remote/cloud-based user options

The project will used as a capability development exercise, and therefore leveraged by the current PSH.1158 project.

4.6 JBS Australia Smart Glasses Project, with AMPC and Bondi Labs

A JBS and AMPC project with Bondi Labs as the provider, will be testing a set of smart glasses (Realwear SMT-1) to determine the feasibility of a range of use cases that will provide benefit to JBS through potential cost-savings, but also future proofing the business in the event of visitor restrictions into high-risk operational areas (e.g. caused by COVID-19). The project is utilising Smart Glasses for the testing of use cases across Operations, Engineering, and Sales & Marketing.

This involved testing a set of smart glasses (Realwear SMT-1) to determine the feasibility of a range of use cases that will provide benefit to JBS through potential cost-savings.

Test use cases includes:

i) Operations:
   a. GFSQA: remote auditing of QA: Aus-Meat, Department of Ag.
   b. Supply chain visibility and traceability for both customers and government bodies' e.g. External government department connecting to improve relationships and supply chain visibility. Example that Teys started with was Chinese government.
   c. Labelling recognition
ii) Feedlot:
   a. Animal welfare and animal health: pen rider wearing a set of the glasses, or an older more experienced pen rider using this as training for a new recruit.
   b. Remote livestock monitoring – e.g. vet dialling in, similar to tele-health
iii) Engineering:
   a. Repairing plant and feedlot equipment remotely in the instance that a highly specialised repairperson cannot access the equipment
   b. Ongoing checks of project construction and progress
   c. Ongoing checks of equipment wear and tear in both Plant and Feedlot
iv) Sales/Marketing:
   a. Due to travel restrictions the smart glasses could allow our customers to connect remotely for a plant site visits, improving our customer relationship management and fielding questions re our processes
v) Livestock:
   a. In conjunction with a producer feedback portal, this could give producers live or recorded video of the grading process, building trust between JBS Australia and the Producers.

Refer to Third party remote audit of Smart Glasses at JBS Beef City (See Section 7.4).

4.7 Co-innovation program – Independent Evaluation

4.7.1 Background

An independent evaluation of the baseline innovation capability was commenced in the current quarter with a JBS workshop (in November 2018) including a series of interviews and follow up exercises at the JBS offices.

4.7.2 Scope & purpose

There was an opportunity for individuals who have successful influenced an idea to reality, and opportunity for JBS to participate in the Innovation Rewards & Recognition program and recognise those involved in innovation. The outcomes of the innovation evaluation (an industry funded project) was presented once other evaluations are completed later in the year.

4.7.3 Findings & outcomes

An independent evaluation of the JBS Co-innovation program (including JBS digital marketing strategy) has now been completed with a summary captured in the interview notes. An innovation rewards

story board, which will be used third party accreditation of innovation credentials, is now under development.

JBS is a long-term partner with the MLA Co-Innovation Program commencing in 2009 and completing three stages to 2019.

The primary objectives of the engagement were:

- process efficiency
- productivity gains
- safety improvement
- yield improvement.

4.7.4   Impact & benefits

Improved productivity – Lamb robotics-Automation which allows more precision cutting and improving the yield.

Improved sustainability and environmental impacts-a lot of small ad hoc projects, for example the water treatment plant, King Island covered lagoon, recycling waste and compost and new forms of packaging

Increased quality-Spray chilling and animal welfare projects

Improved customer experience – Co-funded digital officer to improve customer focus

Improved safety – Bladestop and lamb robotics have increased safety

New markets – Through the customer focus we have developed new markets

New products – New value-added products through Andrew's Meats

External collaboration – Murdoch University and Teys, for example

Internal collaboration – Some collaboration with feedlots. Using an internal project team structure

Increased R&D – Greater confidence in working with other service providers. Previously didn't do much R7D because of the risk involved. This program has changed the attitude toward R&D.

Greater strategic focus on innovation – Innovation is part of our strategy.

Improved industry innovation - Definitely- early adopters of new technologies- automation and semi automation in beef; Introduction of anammox a bacterium that eats the nutrient in waste water

Increased innovation maturity – We are better at adoption

Improved supply chain relationships – Providing better feedback to our supply chain.

Elevating practices within the wider industry - Definitely.

4.7.5   MLA's contribution

"We may not have done these projects without MLA support. The funding was a catalyst for innovation and research and development within JBS. It lessened the risk. Many of the projects were trials for technologies which has benefitted the whole industry. We put in an ideas scheme with a reward system. We don't need that anymore because people willingly share ideas with their team."

Introducing research/technology - Yes
Access to technologies – Yes provided a conduit to technology suppliers.
Access to expertise – Yes definitely
Scaling or replicating technology -Yes spray chilling has been internally scaled.
Building capability - Yes in feedlots around connecting with drug administration companies and animal health. We had to develop expertise to implement spray chilling.
Building confidence – MLA partnership minimised risk
Building collaboration – With external providers and the competition

4.8 Independent third-party evaluation of co-funded JBS Digital Supply Chain strategy (Project V.ISC.1933)

An independent third-party evaluation of the co-funded supply chain and digital capabilities programs was commissioned by ISC in 2021 (project V.ISC.1933:

4.8.1 Background

In 2017 the Integrity Systems Company (ISC) board approved funding for up to 15 co-funded Supply Chain Feedback Extension Officer (SCFEO) positions. The purpose of these positions is to support the development and implementation of feedback systems and associated extension materials to improve producer decision making and management practices for enhanced farm productivity. The program evolved to also include Digital Supply Chain Officer (DSCO) and Digital Marketing Officer (DMO) roles to provide the specific support required within individual partner businesses to improve data use and insights for decision making and to support data integrity systems. In November 2020, ISC engaged Beattie Consulting Services, Inspiring Excellence and Warren Straw Consulting to undertake an evaluation of the co-funded resources program as a first step toward redevelopment of a business case to guide future investment in the program. This included reviewing the outcomes of the current JBS Digital Supply Chain role (P.PSH.1158).

4.8.2 Project scope and objectives

The objectives for the ISC co-funded resources program evaluation involved completion of the following activities:

1. Review the performance of Digital Supply Chain Officers and Supply Chain Adoption Officers to date, including:

   • Alignment of co-funded resources with ISC 2025 strategy and contribution of impact
   • Assessment of performance to assist employers in supporting Livestock Data Link (LDL) development and/or integration within supply chain (this can include third-party LDL systems)
   • Assessment of benefit co-funded resources are delivering along the specific supply chain, including the benefit delivered directly to producers within these supply chains
   • Assessment of current structure of role and evaluation of whether roles and responsibilities of resources are currently meeting objectives, including career level/position within company to influence its digital strategy and implementation of digital resources

2. Review of internal contribution to impact of co-funded resources, including a review of internal value creation being developed through co-funded resources and recommendation of any changes to current structure and management for maximum impact.

3. Impact Assessment: Assess and define the predicted triple-bottom line impacts of investments made to date. The economic impact will be based on measuring the contribution to adoption and impact for key outputs (products) as noted above. Social and sustainability benefits (such as improving a processor's general innovation capability) will also be measured via the Meat and Livestock Australia (MLA) triple-bottom line impact assessment framework, which will be provided.

A brief analysis of each of the 15 Supply Chain Feedback Extension Officer positions will be included, including commentary on the level of success achieved in each position against the above impact criteria.

4.8.3   Stated Purpose of Role

The stated purpose of the JBS role is to build expertise and resources within JBS to enhance digital capability, specifically through the provision of advanced analytics of datasets in order to gain new insights for the business. The purpose of the program is to analyse value in linking existing and new company data with other datasets and mining the data in order to generate value and new opportunities. The primary focus of the role is the implementation of the agreed JBS/MLA Digital Strategy across the JBS's business.

The primary goal is to provide support in the form a dedicated Digital Marketing Manager resource to deliver a data capture and analytics processes to allow the Australian Meat and Livestock Industry to define the various processes and required metrics for running red meat value adding production facilities through to the (domestic and export) customer.

4.8.4   Approach and methodology

The evaluation methodology involved two key stages:

Stage 1:   Assemble and review available project information and data for each role.

Stage 2:   Complete a 360-degree stakeholder engagement process for each role via a series of phone interviews.

Stage 1 primarily involved assembly of project milestone reports and obtaining the most recent reports which were delivered in the interim, along with other background information relevant to each of the roles.

Stage 2 involved development of a series of questionnaires for a range of stakeholders for the 360-degree review in consultation with MLA/ISC. These questionnaires were initially piloted with a small number of stakeholders, and reviewed and revised as required. Of the 16 positions identified in the project evaluation objectives, 13 were included in the review as the remaining three had only just commenced or been contracted.

The 13 co-funded roles reviewed are currently at various stages of delivery relative to their contract term of employment, with one role being cancelled by the industry co-partner prior to the end of the contracted term. Therefore, the number and type of stakeholders engaged for the 360-degree reviews varied depending on the stage of delivery of each co-funded role.

In addition to interviews with each of the 13 incumbents, interviews were conducted with eight MLA/ISC stakeholders, and with 20 representatives from industry partner organisations (13 interviews) and a range of related beneficiaries and service providers (7 interviews).

4.8.5 Results and findings

JBS invested in the co-funded Digital Marketing Manager role to bring some new insights into the way they do business and to increase their digital engagement from a marketing perspective. The company was also wanting to enhance their ability to take advantage of new opportunities in the digital space. Key achievements of the role to date have included:

Supported development of a King Island Beef brand traceability system to support the proof of authenticity of locally sourced King Island beef. This is one key initiative to enable JBS to connect with their customers and potentially end users in the supply chain.

Tailoring an off the shelf enterprise brand management platform to house all of the company's brand assets online and enable JBS customers to use the platform to access and tailor these brand assets for their own marketing activities. This platform ensures high quality and consistent use of brand assets and value adds to customer service. The platform is currently being tested.

Supporting customers to develop or revise ecommerce trading platforms to increase sales and demand for JBS products.

Role in driving a JBS project alongside AMPC and Bondi Labs to test a set of smart glasses (Realwear SMT-1) to determine the feasibility of a range of use cases that will provide benefit to JBS through potential cost-savings, but also future proofing the business in the event of visitor restrictions into high-risk operational areas (e.g. caused by COVID-19). A range of use cases has been identified, and the site that has been nominated for the first series of trials is Beef City Plant and Beef City Feedlot. Additionally, a second plant, JBS Brooklyn, has been nominated in the next phase of the project, as a set of the smart glasses have arrived on-site ready for pre-flight checklist and testing of IT infrastructure.

Establishment of a strong social media presence for JBS through the aussiebeef communication platforms.

The new Digital Marketing Manager was recruited to the role from a background in the financial services industry, and has been able to adapt and build on his existing skills to focus on a new industry. Initially he had to adjust from previously working in a business to consumer type marketing model to the business to business (customer) marketing model that applies for JBS. The company has recognised that in addition to skills in marketing to customers, more generalist supply chain knowledge is needed to better align the customer end with the production end of the JBS supply chain. A greater focus on developing digital capability and the ability to provide broad data insights across the entire supply chain would greatly assist JBS to build further digital capability to support decision making across the supply chain.

The incumbent has played a key role in informing and upskilling other company staff, particularly in the sales and marketing teams, around digital marketing tools and techniques, and has also supported the digital capability of JBS customers via support provided for development of ecommerce solutions and brand marketing and activities. The incumbent has encountered some challenges around shifting the culture of the organisation more broadly around the use of digital marketing solutions, and of data technology solutions more broadly, however progress is being made toward addressing internal resistance to change among some elements of the company.

The role has around 6 months remaining for the current employment term, and the focus during this period will be on continuing development of current projects including the Smart Glasses project, the brand assets portal and the CRM system. A primary focus in the next phase of role delivery will be Consumer Connect Digital Web Portal - Discovery and Scoping. A detailed scope has been developed and approved by JBS senior management to proceed to the concept build of consumer connect portal, including trialling and customer interfacing. As part of the Consumer Connect Digital Web Portal development, the off the shelf solution will be built and trialled with a pre-selection of customers and end users.

4.8.6   Conclusions and recommendations

The evaluation of the ISC co-funded resources program has found the program overall, to be very successful in supporting partner companies to drive digital innovation across the supply chain. The key findings supporting the continuation of the program include:

1. There is evidence to show that companies supported through the co-funded resources program have implemented new, innovative digital solutions to collection, integration, analysis, storage and visualisation of data across different parts of the supply chain from procurement of livestock to marketing the end product.
2. The incumbents in the co-funded roles have tested, trialled, piloted, initiated and adapted new digital innovations within their companies. This has led to improvements through feedback provided to suppliers and created processing efficiencies for the company as well as improving the use of data to gather insights and make decisions.
3. The incumbents have been instrumental in driving the process to embed new digital innovations into day-to-day operations by building capability within the partner companies to support utilisation of digital innovations to deliver on company priorities.
4. The Supply Chain Feedback Extension Officers have made progress in developing feedback systems to suppliers/producers to enable carcass quality and disease/defect data to be provided on an individual carcass basis. While this is still an area that requires further work to link feedback to on-farm practice change and improvements in carcass quality, the foundations have been built to move this work forward.

This review has also identified that most existing roles are likely to continue beyond the current co-funded employment terms regardless of potential ISC ongoing investment, and that most companies appear willing to continue partnering with ISC in this program if the opportunity arises. The issue for MLA to consider now is if the potential internal value to MLA/ISC, and/or potential increase in speed and quality of outcomes achieved by the roles with ongoing MLA co-investment, is sufficient to justify further investment in existing roles, especially considering they may continue anyway. Alternatively, MLA may consider there is more value to be gained by investing these resources elsewhere, either in

more new roles in the same program (even potentially some within existing partner companies where a need for additional digital resources has been identified), or in other projects entirely.

If the co-funded resources program does continue in the future, whether that includes continued investment in existing roles and/or investment in new roles, the following recommendations are provided:

- MLA appoints an overall program manager to lead the program, drive the strategic direction and implementation of the program and to manage all positions, along with a network of internal MLA/ISC mentors who are assigned to individual roles according to specific knowledge and skill areas identified to add maximum value to each role.
- Increased strategic planning around where investment is targeted to achieve program objectives.
- Develop a program Communication and Engagement Plan to support a more strategic approach.
- Improve the ability of both MLA and company partners to measure and report on the success of program investment through defined monitoring and evaluation processes.
- Review and clarify role employment criteria and employment terms.
- Identify opportunities for increasing the value of the network of co-funded roles. Opportunities include providing more opportunities for networking beyond the current two meetings per year (COVID-19 permitting) e.g. additional training workshops on topics of mutual interest, such as change management, or concurrent workshops on different topics at the same event with opportunities for co-mingling, or opportunities to present to each other on specific role achievements. Also, including team building activities and/or joint projects as part of the networking events to build relationships and trust between incumbents.

Opportunity exists to work with partner companies to review opportunities to increase adoption of available feedback by buyers and suppliers to improve livestock procurement and farm management decision making. It was proposed to consider more face-to-face and one-on-one engagement and support for buyers to assist with adoption. Also define target metrics and measures of success for buyers in the use of feedback data, specifically more one-on-one support of producers with advice tailored to specific businesses.

4.9 Insights & trends

MLA Insights Team has provided customised insights & trends in support of current new initiatives to JBS, including:
- Top 5 Digital Consumer Trends in 2020 webinar & slides (Source: Euromonitor International)
- Attached is a ppt deck with up to date latest projections / market information.
- These two documents provide further detail and discussion around many of the charts and an overview of the latest supply and global demand dynamics. See links:
  - Beef projections update (October 2019)
  - Global beef snapshot
- The latest trade data can be accessed via the monthly trade summaries on the website, here [See attached the September beef trade summary].
- Information on specific quota usage can be found on the Global Quota Tracker , updates of which can also be found on the website above.

4.10   Learning & development

4.10.1 Learning & development plan

The learning & development plan has been developed for the Digital Marketing Manager. Refer to Section 7.1 for the learning & Development Plan.

4.10.2 Training & support

Training and support included:
- Digital Marketing officer visited MLA offices to update on market insights/trends and methods.
- Ad hoc support and training on a regular basis.

Key training events:
- Attended *Integrity Systems Stakeholder Forum* in North Sydney, on Thursday 8 August. The forum showcased the Integrity System Strategy – 2025 and beyond, and we heard from leading red meat and livestock industry specialists who shared the opportunities technology presents, what a future integrity system could look like and the benefits it can deliver along the supply chain. Interesting and thought-provoking discussions included topics around sharing objective carcase measurement data with producers to better build upon their breeding and genetics, block-chain technology to show provenance to overseas consumers, and technology solutions to challenges facing producers around day-to-day internet connectivity to further improve on their tech stack and data sharing.

- Attended B2B marketing workshop, held in Brisbane on Thursday 29 August. The event was a workshop which explored how to build an integrated digital marketing plan for a B2B company. This was especially useful given how many marketing forums only focus on B2C plans, or are consumer-focused. The unique business that JBS operates in, at scale, makes this challenging when learning from industry experts in the marketing field.

- Attended Google @ iProspect agency forum with digital marketing industry experts. This forum, which was co-presented by Google, gave significant value in establishing what requirements are needed for a fully integrated digital marketing stack, and what tech needs to talk with each other – including 'pain-points' commonly experienced within the industry and how to overcome these.

- Working closely with JBS Southern division, a new traceability and provenance digital program is in development that will integrate from the JBS processing plant to the brand website, giving all points of the supply chain including consumers' full traceability of the King Island beef product. We plan on releasing this provenance traceability project in the coming months, which is a business first and very exciting marketing initiative to provide value to the business and JBS customers.

- Coordinated filming of the Beef City Plant and Feedlot (Est 170) as part of the Toowoomba Regional Council local business initiative which aims to promote the region as a viable investment for agriculture, including the Meat and Livestock industry. The Beef City plant is a part of the Beef City integrated feedlot, processing and farming facility, specialising in grain fed processing. (https://www.youtube.com/watch?v=lleOgetWE-8)

- Meeting with several different suppliers to investigate costings and requirements to implement these platforms for our digital portal project. The technical requirements to 'plug into' our CRM, and resources required are currently being researched.

- Attended a digital marketing industry and networking event, held in Brisbane on 19 June 2019. This event featured a panel of experts where the topics "getting more metrics from meaning moments" and "social media best practice" were discussed at length. This event provided valuable insights into how other industries (in this instance Wagering, Retail, and FMCG) tackle business challenges and "how to win".
(https://brisbane.networxevents.com.au/events/social-media-2019)

- Integrated a data capture form within the JBS WeChat platform for new customers and end users requesting access to use our brands, which is then forwarded to the China Sales Team. We are investigating in conjunction with our WeChat agency partner new ways to build on our audience base, to further improve our supply chain visibility within the Chinese market.

- Co-innovation meeting with JBS Co-Innovation managers and senior JBS managers and ISC-MLA & AMPC relationship managers on 15 March 2021. A key outcome was an update on the JBS-ISC collaborative livestock compliance portal and required data/digital capabilities.

4.10.3 Participate in internal and external networks to accelerate outcomes

Participated in internal and external networks to accelerate outcomes, including the Co-Innovation & Digital / Supply Chain managers networking events. Various workshops and consultants were engaged to accelerate outcomes for each project. JBS Digital Marketing manager attended and actively participated in the ISC-MLA "Supply Chain & Digital" network forums [See agenda in Appendix], including:

- Value Chain Officer Workshop" forum (6th & 7th May 2020) – Refer to program agenda and topics included in the Appendix (see Section 7.1.1).

- Supply Chain & Digital Value Chain Officer workshop (1st & 2nd December 2020). Refer to program agenda and topics included in the Appendix (see Section 7.1.2).

- Co-innovation networking workshop (17th & 18th February 2021). Refer to program agenda and topics included in the Appendix (see Section 7.1.3).

- Co-innovation networking workshop (3 & 9 June 2021). Refer to program agenda and topics included in the Appendix (see Section 7.1.4).

4.10.4 MLA Market and Category Driver Assessment Tools – Prospectus

There was an opportunity to update JBS digital marketing manager and JBS brand category team on market insights and category growth drivers, presented by MLA's Garry McAlister and Miho Kondo.

A short prospectus summarises the benefits of the MLA market and category driver assessment tool. Targeted opportunities that are underpinned by insights is proposed to be presented to JBS category team over a series of presentations (Refer to Figure 4).   It is proposed that this will provide JBS a significant opportunity to use various tools to help either reinforce their current market and brand strategy and/or to challenge JBS's thinking about certain markets and segments (See Figures 5-6).
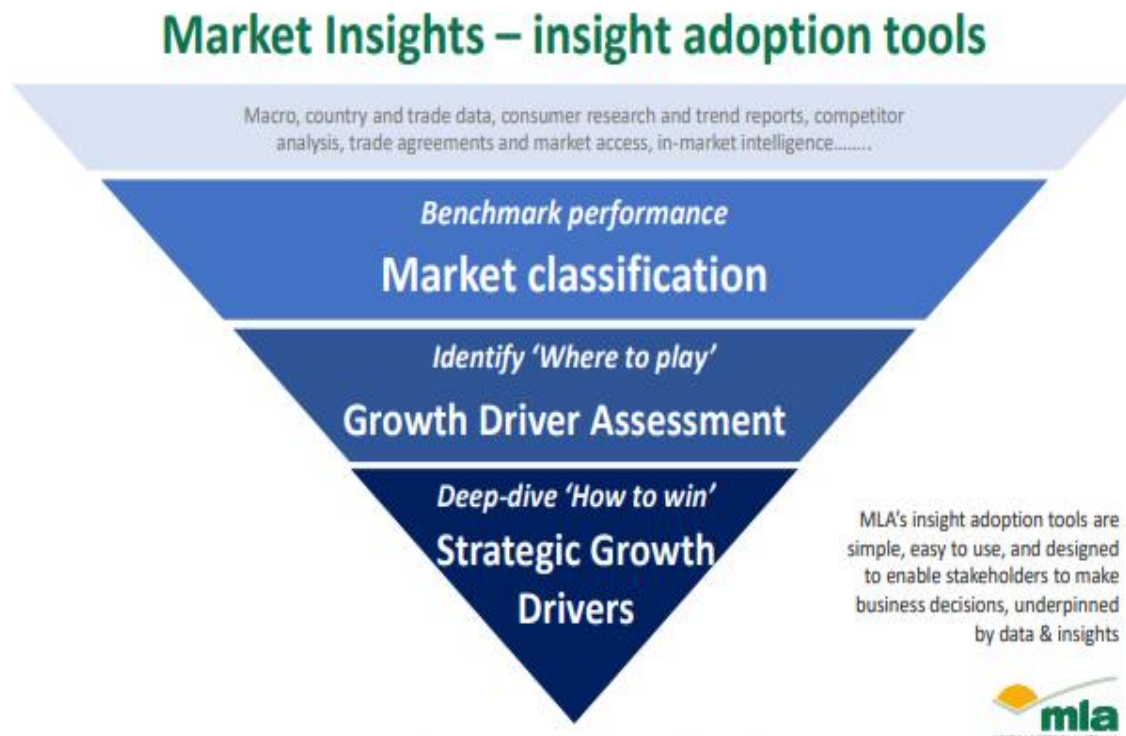
Figure 4. Targeted opportunities underpinned by insights [MLA's Market insights tools prospectus].

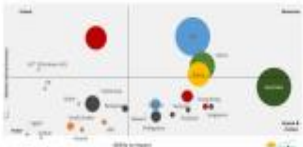There are essentially three steps to this process, including:

1) Market assessment – Provides a broad overview of market attractiveness and how your brands are performing. (Noted that MLA Insights team has discussed this with JBS previously).

2) Growth driver assessment – Matches category growth drivers against your current or future brand specifications for target markets to help identify opportunities and potential priority markets.

3) Deep Dive - Provides a deep dive for specific markets / market segments to identify brand 'must have' attributes and potential opportunities you may not have considered.

Figure 5. Insight adoption tools for market opportunity classification.

Figure 6. Insight adoption tools for strategic growth drivers.

MLA proposes the following steps and timelines for JBS/ MLA to work through this process, essentially if JBS's provides MLA the required data, MLA's Insights team will analyse the numbers and present the finding back to JBS's market category team.

4.10.5 JBS livestock compliance portal (P.PSH.2056)

The purpose of the project is to evaluate, design and build options for a livestock compliance and producer feedback management systems to improve quality and consistency of supply and increase livestock margins.

The current status is successful completion of the design and build of the dashboard visualisation and mapping of data sharing requirements between JBS and ISC (ie Milestone 2b), including:

i) Design & build buyer dashboards (Milestone 2a)
- Design & build dashboards:
- Design user interface and visualisations:
- Animal Disease and Defect
- Data agreements and API integration
ii) Producer/buyer engagement and dashboard refinement (Milestone 2b)
- Build and Test (Unit and System)
- Detailed producer engagement and company data capability & adoption plan
- Visualisations

Specifically, a range of JBS and ISC collaborative initiatives are proposed to further support the ongoing design and build phase, including:
- JBS technical has reviewed animal disease specifications and data capture screen options. ISC Animal disease team to meet and update on inspection & data capture standards & review collaborative project opportunities to assist JBS animal disease surveillance.
- Agreed to arrange staged meetings with MLA groups to investigate value propositions with new data sets, specifically animal disease, Lean meat yield (LMY), data standardisation, etc.
- JBS Northern operation aspirations are 1.4M cattle per year integrated in the feedback portal with initial priority to provide simple carcase compliance feedback (based on grid compliance initially) and revenue & indicative revenue opportunity gains on weight & cattle classification.
- The capability and capacity of the model and data shared to producers will be expanded over time. The initial focus is to start simple and easy to use (but enable drill down if required), and develop JBS's internal capabilities.
- While JBS Southern now has the prototype model, the key focus is developing and expanding portal in Northern cattle.
- JBS presenting feedback portal working concept prototype model at a JBS booth at Beef Week 21. In addition, JBS presenting with ISC & MLA at joint feedback session at Beef week 21.
- Ongoing development of Animal Disease and Defect components
  o Understand and develop roadmap for integration of JBS Australia with industry animal disease and defect recording
  o Engage with ISC Project Manager to plan for integration of animal disease and defect standards within platform and within meat inspector operations (support to IT team and QA team can be provided by ISC)
- Data agreements and API integration will be reviewed in consultation with ISC technical team and JBS IT to ensure the IT requirements for data ingestion and sharing are considered. Specifically, collaboration between JBS with MLA will be conducted to understand the scope and appropriate data arrangements. Potential options presented to JBS & MLA steering group for review and

consideration, including limitations and restrictions from the JBS business around data governance.

Feedback from JBS producer and buyers, including the feedback for the Beef 21 portal demonstration will be reviewed and consideration in any ongoing design and build considerations.

The phase 1 pilot dashboards were presented to senior management by the EY and JBS development team. The pilot demonstrated the ability to deliver large complex data sets in an easy to visualise interactive format. The dashboards were well received by the management team. The graphical visualisations allowed the team to easily see trends and producer overviews. They allowed producers to be benchmarked against key traits. While the feedback was very positive there were some key findings of the pilot phase that required improvement.

The key findings were:
- The compliance methodology required a re-work. Using the booking type as a livestock compliance metric was not a true indicator of the performance of the producer and animal's performance. The booking type is use by the livestock team as an indicator of the type of animal being booked. Depending on the size of a consignment or the ability to physically inspect the animals it is not a true reflection of the correct classification or quality of the animal.
- The initial dashboards were quite busy with a bit too much data per page. Some of the visualisation were difficult to analysis and required simplification. The use of the non-compliance

Significant producer and buyer engagement via producer/buyer forums and also via Beef Australia. JBS captured detailed producer and buyer feedback. Feedback, whist generally positive, was primarily about how the data was to be viewed and ability to further expand and drill down and access individual animals NLIS tags so they could be used in the producers system to see genetic lines. It was decided that the dashboard should be released at Beef week with a significant producer engagement piece developed to support this.

The producer feedback from producer engagement at Beef Australia was excellent and provided significant input into rescoping elements of the portal. The demonstrations at Beef Australia 21 highlights some improvements in the data presented and the format. Overall, producers were very interested in the data and were looking for improved feedback. A summary of feedback was as follows:
- Like the simplicity - Traffic light reporting
- Love the missed revenue
- Many would like to drill down and get more detail on NLIS tags that failed or performed well
- Most asked about getting access as soon as possible

The overall feedback provided through extensive consultation from producers and/or buyers. A summary of the general comments were as follows:
- Overall positive
- Like the simplicity - Traffic light reporting
- Love the missed revenue
- Many would like to drill down and get more detail on NLIS tags that failed or performed well
- Most asked about getting access as soon as possible

Feedback, whist generally positive, was primarily about how the data was to be viewed and ability to further expand and drill down and access individual animals NLIS tags so they could be used in the producers system to see genetic lines.

5. Key messages, successes and challenges

5.1 Key messages

The digital marketing strategy program was considered successful by providing a catalyst to fast-track digital innovation capability within JBS, namely:

- Recruitment and lines of reporting to enhance practice change [Key learning #1]
- Developing a data culture [Key learning #2]
- Building trust in company's data to make decision [Key learning #3]
- Networks delivering benefits by accelerating uptake of new methods [Key learning #4]

5.1.1 Recruitment and lines of reporting to enhance practice change [Key learning #1]

The initial phase involved recruitment and engagement of full-time employee. A suitable candidate was sourced from outside the business with the required skills and capabilities new to JBS Sales and Marketing team to develop and implement JBS's digital and supply chain strategy. It also involved structuring the marketing team over time such that the new recruit reported directly to senior management to ensure the project could influence and drive change in supply chain capabilities.

5.1.2 Developing a data culture [Key learning #2]

As determined by the independent third-party evaluation of the co-funded supply chain and digital capabilities programs (project V.ISC.1933), the number one question asked by operational team members was "What's in it for me"?. The value proposition changes depending on your role. The system is required to deliver value to every level of decision-makers to drive engagement and data integrity.

As the industry continues to develop lean meat yield feedback systems and combining with MSA data in feedback for suppliers, the industry will need to focus on communications and extension of this to suppliers to ensure that the data/information that is supplied is in actionable form. Information needs to be presented in a manner that encourages action. A series of tools will need to be developed which will enable cattle producers to make improvements to their business. The industry needs to be ambitious enough to link carcase performance data (LMY, Eating Quality and potentially animal health) with various traits, including genetics.

A "leading from behind culture" was required by the Digital Supply Chain officer(s) to address these challenges with data adoption and confidence in making decisions from the data. Finally, it was considered that one of the biggest challenges was to maintain data integrity.

5.1.3 Building trust in company's data to make decision [Key learning #3]

The biggest challenge is the change management process, getting people in the company to trust, understand and use these new approaches. Specifically, the challenges were:
- To integrate multiple data sets throughout the supply chain.
- To create meaningful information that can be delivered to decision makers in a timely manner.

- Allowing them to be more proactive rather than reactive to the situation or environment they face to help drive productivity and profitability.

The first step was for the company to decide to capture data on properties. Bringing in external new recruits with data/digital expertise to drive change was, in reality, not the solution. The reality was that the operational teams on the properties were responsible for the capture of data. The digital officer(s) had to work (on the ground) with operational teams to better understand their processes and included them in the design process.

In addition, user experience can't be underestimated. This is a new process and needed to build an "experience" that caused the least amount of disruption. Data capture is a new skill for most people. The key lesson was to be patient and provide plenty of training and support.

5.1.4 Networks delivering benefits by accelerating uptake of new methods [Key learning #4]

The networking opportunities provided by MLA and ISC with other Digital and Supply Chain co-funded roles (twice annually) provided significant benefits through sharing collective experiences to accelerate uptake of new methods and techniques.

5.2 Benefits to industry

The co-funded roles have contributed toward achievement of a range of MLA key outputs (products) and their value propositions, including:
- Economic benefits
- Environmental/sustainability benefits
- Socialised benefits

5.2.1 Economic benefits
The Australian red meat industry has a shared vision to double the value of red meat sales as the trusted source of the highest quality protein, and MLA has identified a range of key areas of strategic focus to support delivery against this vision. One of these focus areas is around ensuring that decision making is informed through data and insights.

The ISC co-funded roles are supporting the delivery of impact for industry in this focus area by assisting to increase the efficiency with which data is collected, integrated, analysed and presented for use to decision makers across the supply chain. Some examples of savings in labour or operating costs were provided in some cases, however overall, insufficient data was available to assess the value of economic impact due to MLA investment in these roles. The Digital Marketing co-funded role are potentially contributing primarily by providing insights and enabling outcomes that support building industry capacity and capability to drive improved use of data for decision making.

5.2.2 Environmental / sustainability benefits
The independent review (i.e. project V.ISC.1933) identified many of the co-funded roles have contributed toward achievement of environmental and sustainability outcomes. They were also found to be contributing to improving animal well-being by increasing data capture and feedback to producers around animal welfare issues and thereby increasing awareness of the health and well-being of animals to identify and deal with any major issues. Improved data systems are also supporting

feedlots to more accurately identify key sources of mortality and morbidity so that they can be addressed more rapidly and effectively. In contributing to impacts in these areas of animal well-being and climate change mitigation, the roles are also assisting industry to better meet consumer needs and to build trust among customers and consumers of Australian red meat.

5.2.3   Social benefits

A key intended outcome of the co-funded program is to build digital innovation capability across the supply chain to better equip the industry to progress more rapidly toward increasing red meat carcase values. During the independent third-party review process (project V.ISC.1933), partners including JBS was asked to assess how the co-funded roles have contributed toward increasing the ability of partner companies to take advantage of new and evolving digital technology. The findings showed in terms of ability prior to commencement of the role, expected ability by the end of the current role employment term, and estimated ability at the same time if the role did not exist. The overall role contribution is the difference between the expected ability of the business to take advantage of new and evolving technology with and without the role.

5.3 Challenges & issues

The key challenge identified was that having a co-ordinated approach across JBS operations to allow ideas for business improvement to be mined and managed. Specifically, there was an issue with managing R&D pipeline with so much R&D activity across the business, and the need for a co-ordinated internal process to manage ideas in the pipeline.

6. Conclusion / recommendations

6.1 Conclusions

The project was successfully completed with the following deliverables being achieved:
- Finalise position description & commence recruitment.
- Recruitment of the Digital Marketing Manager.
- Company / MLA steering committee formed. Initial steering committee meeting completed (10 April 2019).
- Set overarching goals, metrics and outline (to be presented to the Project steering group for input and signoff) with consideration of data availability, metrics and resource planning for digital portfolio.
- Digital Marketing Manager commenced the development of a framework and processes for implementation of red meat digital strategies & R&D projects portfolio.
- A primary focus of the role to date has been development of the Customer Connect system (one component of the overall JBS Digital Strategy).
- A draft JBS & MLA collaborative digital marketing strategy has commenced, with ongoing input required from the project steering group.
- Developed a Learning & Development plan for Digital Marketing Manager.
- Participated in internal and external networks to accelerate outcomes. Various workshops and consultants were engaged to accelerate outcomes for each project.

- Participated in internal and external networks to accelerate outcomes (including the Co-Innovation & Digital / Supply Chain managers networking events. JBS digital marketing manager officer attended and actively participated in various ISC-MLA "Supply Chain & Digital Value Chain Officer Workshop" and MLA Co-innovation forums.
- Steering group consisting of JBS and MLA including MLA ISC is formed. Actioned steering committee tasks.
- JBS has continued to make significant progress in the development of digital marketing strategy & business systems.
- A draft digital marketing strategy including priorities has commenced with ongoing input required by steering group approval.
- A number of R&D opportunities have been identified and implemented to enhance JBS's capability.

A number of R&D opportunities have been identified and implemented to enhance JBS's capability. The outcome of the review meeting was that the steering group approved continuation of the program to Milestone 6 including the next 12 months priorities.

A key focus of the project for JBS has been developing the King Island Beef traceability system to support the proof of authenticity of locally sourced King Island beef. An article on Beef Central that was published 28 October 2019, outlines JBS's plans to launch a traceability system for one of their signature brands. This is one key initiative to enable JBS to connect with their customers and potentially end users in the supply chain. This will be further piloted and optimised in the next proposed phase.

Consumer Connect Digital Web Portal Discovery and Scoping has also been a key focus area. A detailed scope has been developed and approved by JBS senior management to proceed to the concept build of consumer connect portal, including trialling and customer interfacing. As part of the Consumer Connect Digital Web Portal development, the Outfit solution will be built and trialled with a pre-selection of customers and end users.

Another highlight of the project was the initiation of a new project. JBS alongside AMPC and Bondi Labs will be testing a set of smart glasses (Realwear SMT-1) to determine the feasibility of a range of use cases that will provide benefit to JBS through potential cost-savings, but also future proofing the business in the event of visitor restrictions into high-risk operational areas (e.g. caused by COVID-19). A range of use cases has been identified, and the site that has been nominated for the first series of trials is Beef City Plant and Beef City Feedlot. Additionally, a second plant JBS Brooklyn have been nominated in the next phase of the project, as a set of the smart glasses have arrived on-site ready for pre-flight checklist and testing of IT infrastructure.

The Outfit platform has been adopted and is currently in-use by one of JBS Australia's key domestic foodservice customers. This customer is using the platform to effectively and efficiently market JBS brands to their foodservice customers with success. Adoption of the Outfit platform has been slow to progress, and a strategy and targets have been set to ramp up adoption and increase the value that the platform will provide the business. JBS internal business units will be encouraged to use the platform as Outfit will: reducing the double handling of work, standardising JBS corporate wording and imagery across easy-to-use templates and designs that other BU's can use, and creating a formalised approval process to generate more efficiency of department's time and resources.

6.2 Independent reviews

An evaluation of the baseline innovation capability was commenced in the current quarter with a JBS workshop (in November 2018) including a series of interviews and follow up exercises at the JBS offices.   There is an opportunity for individuals who have successful influenced an idea to reality, and opportunity for JBS to participate in the Innovation Rewards & Recognition program and recognise those involved in innovation. The outcomes of the innovation evaluation (an industry funded project) will be presented once other evaluations are completed later in the year.

An independent evaluation of the JBS Co-innovation program (including JBS digital marketing strategy) has now been completed with a summary captured in the interview notes. An innovation rewards story board, which will be used third party accreditation of innovation credentials, is now under development.

JBS is a long-term partner with the MLA Co-Innovation Program commencing in 2009 and completing three stages to 2019.

The primary objectives of the engagement were:
- Process efficiency
- Productivity gains
- Safety improvement
- Yield improvement.

An additional independent third-party evaluation of the co-funded supply chain and digital capabilities programs was commissioned by ISC in 2021 (project V.ISC.1933). A summary of the findings related to the JBS Digital strategy:

- Supported development of a King Island Beef brand traceability system to support the proof of authenticity of locally sourced King Island beef.
- Tailoring an off the shelf enterprise brand management platform to house all of the company's brand assets online and enable JBS customers to use the platform to access and tailor these brand assets for their own marketing activities.
- Supporting customers to develop or revise ecommerce trading platforms to increase sales and demand for JBS products.
- Role in driving a JBS project alongside AMPC and Bondi Labs to test a set of smart glasses (Realwear SMT-1) to determine the feasibility of a range of use cases that will provide benefit to JBS through potential cost-savings,
- Establishment of a strong social media presence for JBS through the aussiebeef communication platforms.
- A key role in informing and upskilling other company staff, particularly in the sales and marketing teams, around digital marketing tools and techniques, and has also supported the digital capability of JBS customers via support provided for development of ecommerce solutions and brand marketing and activities.

6.3 Recommendations, future research & next steps

There was an opportunity to update JBS digital marketing manager and JBS brand category team on market insights and category growth drivers. Targeted opportunities that are underpinned by insights is proposed to be presented to JBS category team over a series of presentations.   MLA proposes a

series of steps and timelines for JBS/ MLA to work through this process. If JBS's provides MLA the required data, MLA's Insights team will analyse the numbers and present the finding back to JBS's market category team. A proposed timetable (subject to JBS availability) is scheduled over the next 6 months.

There are essentially three steps to this process, including:

1) Market assessment – Provides a broad overview of market attractiveness and how your brands are performing. (Noted that MLA Insights team has discussed this with JBS previously)

2) Growth driver assessment – Matches category growth drivers against your current or future brand specifications for target markets to help identify opportunities and potential priority markets

3) Deep Dive - Provides a deep dive for specific markets / market segments to identify brand 'must have' attributes and potential opportunities you may not have considered.

It is proposed that this will provide JBS a significant opportunity to use various tools to help either reinforce their current market and brand strategy and/or to challenge JBS's thinking about certain markets and segments. A timetable has been scheduled to roll out insights tools to JBS market category team.

7. Appendix

7.1 Network events

7.1.1 Supply Chain & Digital Value Chain Officer workshop (6th & 7th May 2020)

Integrity Systems — red meat customer assurance	**Supply Chain & Digital Value Chain Officer workshop** — **mla** MEAT & LIVESTOCK AUSTRALIA

Day 1 - Supply Chain & Digital Value Chain Officer Workshop (Wednesday 6 May)

1:30pm start (half day), finish around 5pm

- **Consumer Insights Updates -** Putting rejecters into context (including vegans) with Nat Isaac
- **Market Update -** A look at herd & flock numbers and the current forecast with Adam Cheetham
- **Customised Adoption Packages for the Red Meat Supply Chain (Supply Chain Adoption program -** Understand how MLA & ISC can provide support to maximise the impact of your producer engagement activities to benefit your business with Dave Packer
- **Sustainability and CN30 Update -** Program updates since the group Webinar with Doug McNicholl

Day 2 - Supply Chain & Digital Value Chain Officer Workshop (Thursday 7 May)

9:00am start (half day), finish around lunch time

- **Traceability across the supply chain -** The Australian red meat industry has a global reputation as a supplier of clean, safe and natural product. To maintain our competitive advantage, the red meat industry must peruse and invest in new technologies and approaches. There is opportunity to apply improvements to integrity systems from the farm through to the end consumer with the goal of achieving production and efficiency gains as well as building consumer confidence in brand Australia and combatting the increasing risk of food fraud. With Irene Sobotta and Julie Petty

Discussion:

Because we very much in a digital age, and all work with lots of data, we are also thinking we would like to invite MLA/ISC's security partner to do a session on the importance and details surrounding data security etc etc. There are a number of possible areas they have suggested to speak on and I am keen to get your feedback on which session you would like most. We can always get them to come along next time and present on one of the other areas if a few are popular. Specific topics:

   i)   Social Engineering
- Examples (Catch Me if you can, Real world Pen-testing scenarios)
- Phishing (Email Social Engineering)
- Sample Phishing Sites / Email
- Real or Phish?, Spear Phishing, Protecting yourself
- DEMO PSHISHING

   ii)   Multi Factor Authentication
- What it is
- How does it work
- How to use it
- Why you should use it everywhere
- Best Practices

   iii)   Personal Identifiable Information and Data Security
- What is it
- Company Data Classification Policy (if there is)
- General Data / Business Data / Customer Data
- Don't copy data to other systems
- Don't turn off data protections
- If you find something you shouldn't have access to. Please report it!

7.1.2 Supply Chain & Digital Value Chain Officer workshop (1st & 2nd December 2020)

Integrity Systems
red meat customer assurance

mla
MEAT & LIVESTOCK AUSTRALIA

Supply Chain & Digital Value Chain Officer Workshop

Teleconference

Day 1: Tuesday 1st December 2020 1:00pm to 5:00pm – ZOOM
Day 2: Wednesday 2nd December 2020 9:00am to 12:15pm – ZOOM

Program: Capability building
Sub Program: Innovation capability building
Product Group: Capability building (industry)
Core activity: Investment in digital value or supply chain officers to assist companies to develop a whole-of-value chain digital strategy that leverages the best solutions and ensures they are well positioned for new and evolving digital enablers.

This meeting will run under the Chatham House Rule

Supply Chains:	Michelle Henry – Gundagai Meat Processors
	Matt Martin – Wingham Beef Exports (NH Foods)
	Aimee Bolton – Oakey Beef Exports (NH Foods)
	Maria Crawford – Coles
	Suvir Salins – Coles RROA
	Jordan McIntyre – Coles RROA
	Matthew Zorzetto – JBS
	Harry Evans – Stanbroke
	Ashley Gunnis – Australian Country Choice
	Chris Lutton – Australian Country Choice
	Nikki Gilder – Greenham
	Jhodie Farrelly – Greenham
	Chamara Fernando – Pardoo
	Madison Campbell – Kilcoy Global Foods
MLA & ISC Staff:	Demi Lollback – NLRS Market Reporting Manager MLA
	Dean Gutzke – Program Manager - Future Feedback Systems ISC
	Irene Sobotta – Research, Development and Adoption Program Manager ISC
	Julie Petty – Project Manager - Digital Supply Chains ISC
	Verity Suttor – Project Manager - Future Feedback Systems ISC
	Naomi Leahy – Project Manager - Supply Chain Data ISC
	Vereena Rooney – Manager - Market Insights MLA
	Stephen Bignell – Manager - Market Information MLA
	Eloise Fogarty – Data Analyst ISC
	Luc McCann – Project Manager - Digital and Data ISC
Guests:	Wayne Pitchford – University of Adelaide/ALMTech
	Sean Miller – University of Adelaide/ALMTech
	Peter McGilchrist – University of New England/ALMTech
	Owen Keates – Hitachi Vantara
	(ALMTech - Advanced Livestock Measurement Technologies)
Apologies:	Richard Apps – Program Manager - Objective Measurement MLA/ALMTech
	Joel Bentley – Australian Country Choice

Version: Monday 30th November 2020

Item	Time	Day 1 – Tuesday 1 December 2020	Responsible
		Teleconference *Join Zoom Meeting* https://zoom.us/j/91667917911?pwd=bUMxWDBSY3h3RnlrOFd6OllTTiZHZz09	ALL
1.	1:00 – 1:15 (15 mins)	Meeting start – Welcome and introductions (time to sort out any IT issues before we commence)	Demi
2.	1:15 – 1:30 (15 mins)	Data custodians Our integrity systems are built on data, but just how much?	Irene
3.	1:30 – 2:00 (30 mins)	How can our integrity systems be improved? ISC is undertaking work to make sure the foundations are strong with an eye to future needs and functions to support industry stakeholders.	Julie
4.	2:00 – 2:30 (30 mins)	Future Feedback Reports – The new LDL ISC and the LDL Team is currently looking at what feedback systems of the future need to provide for industry. To achieve this the team is undertaking sprints with industry participants to identify how the value of industry data can be maximised	Naomi & Eloise
	2:30 PM	Break (15 mins)	
5.	2:45 – 3:15 (30 mins)	Market Update A look at herd & flock numbers and the current forecast	Stephen
6.	3:15 – 3:45 (30 mins)	Consumer Insights Update Plus, what impact has COVID-19 had on the red meat industry	Vereena
7.	3:45 – 5:00 (75 mins)	Group WIP (Work in Progress) 5 minutes/person • What are you working on? • What are your challenges? • Do you need resources or assistance with anything?	ALL
	5:00pm	Finish for the day	

Version: Monday 30th November 2020

Item	Time	Day 1 – Tuesday 1 December 2020	Responsible
		Teleconference *Join Zoom Meeting* https://zoom.us/j/91667917911?pwd=bUMxWDBSY3h3RnlrOFd6OllTTiZHZz09	ALL
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2.	1:15 – 1:30 (15 mins)	Data custodians Our integrity systems are built on data, but just how much?	Irene
3.	1:30 – 2:00 (30 mins)	How can our integrity systems be improved? ISC is undertaking work to make sure the foundations are strong with an eye to future needs and functions to support industry stakeholders.	Julie
4.	2:00 – 2:30 (30 mins)	Future Feedback Reports – The new LDL ISC and the LDL Team is currently looking at what feedback systems of the future need to provide for industry. To achieve this the team is undertaking sprints with industry participants to identify how the value of industry data can be maximised	Naomi & Eloise
	2:30 PM	Break (15 mins)	
5.	2:45 – 3:15 (30 mins)	Market Update A look at herd & flock numbers and the current forecast	Stephen
6.	3:15 – 3:45 (30 mins)	Consumer Insights Update Plus, what impact has COVID-19 had on the red meat industry	Vereena
7.	3:45 – 5:00 (75 mins)	Group WIP (Work in Progress) 5 minutes/person • What are you working on? • What are your challenges? • Do you need resources or assistance with anything?	ALL
	5:00pm	Finish for the day	

Version: Monday 30th November 2020

Item	Time	Day 2 – Wednesday 2 December 2020	Responsible
		Teleconference *Join Zoom Meeting* https://zoom.us/j/91301305829?pwd=eE52RihoY2JwdzRWTHpFT2JmYlBJUT09	
8.	9:00 – 9:10 (10 min)	Debrief of Day 1 – (time to sort out any IT issues before we commence)	ALL
9.	9:10 – 9:45 (35 min)	**Industry Data Platform** MLA has developed the Industry Data Platform. The data platform allows us to leverage our data in ways we haven't been able to in the past, including linking, cleaning and producing quality datasets for analysis, in addition to providing access to external datasets e.g. climate, soils etc.	Eloise & Luc
10.	9:45 – 10:15 (30 min)	**Carcase Optimisation Progress** ALMTech has been developing tools to assist processors to evaluate the opportunities and benefits of more accurate and precise measurement of carcase yield and quality. For lamb, we have developed prototype Carcase Optimisation Tool that is able to allocate 'the right carcase to the right cut' and compare the profitability of cutting plans. Similar work is about to commence with beef. ALMTech will provide an update on progress made since this group last met in May and discuss opportunities for direct collaboration.	Wayne & Sean
	10:15 AM	**Break (15 min)**	
11.	10:30 - 11:30 (30 min)	**Hitachi** How *Next Generation Supply Chain Control Towers* can drive value in the Beef Supply Chain	Owen
12.	11:30 - 11:45 (15 min)	**Wingham Beef Exports** Matt has developed specific extension material for WBE suppliers as part of his project, and will share some of the key documents	Matt M.
13.	11:45 - 12:15 (30 mins)	**Final group discussion** *Please note – a Survey Monkey link will be sent out to all participants post workshop. Please provide your feedback and comments so we continually improve the topics and content provided at workshops.*	ALL

Activities for 2021

- **January**
  - Monday 18th – Introduction to ALMTech webinar
- **February**
  - Tuesday 9th – MLA innovation insights right across the value chain webinar
- **March**
  - TBA - Dark cutting in feedlot cattle

Media Training

Extension & Adoption Training

Version: Monday 30th November 2020

7.1.3 MLA Co-Innovation Program (17-18 February 2021)

Your progress - Even though 2020 was a difficult year, you were still progressing. Tell us about what you achieved and hear from others.
Future challenges - Are you facing the same challenges as others in your sector? How can you work together to address them?
Your needs - How can MLA help you to keep progressing

Time	Wednesday 17 February 2021 Activity	Time	Thursday 18 February 2021 Activity
9.00am AEDT	Session 1 Opening and Introduction MLA strategy and investment focus	9.00am AEDT	Session 1 Opening Review of day 1 Small group discussions
10.00am	Session 2 Facilitated Workshop 1	10.00am	Session 2 Workshop 3
11.00am	Session 3 MLA Research presentation 1 **Identifying new markets – Alternative uses for hides**	11.00am	Session 3 MLA Research presentation 4 **Managing shelf life and enhancing consumer trust**
12.00pm	Break	12.00pm	Break
1.00pm	Session 4 MLA Research presentation 2 **Advanced x ray imaging update and value proposition moving to VBM and automation**	1.00pm	Session 4 MLA Research presentation 5 **Carbon Neutral 2030**
2.00pm	Session 5 Facilitated workshop 2	2.00pm	Session 5 Workshop 4
3.00pm	Session 6 MLA Research presentation 3 **Environmental credentials for red meat**	3.00pm	Session 6 Wrap up and action planning

7.1.4 MLA Co-Innovation Program (3 & 9 June 2021)

Co-Innovation Network Meeting Agenda (Virtual Meeting)

Day Two Wednesday 9th June 2.00 - 4.00pm		
1.45pm -2.00pm	**Co-Innovation Manager Introductions**	Note: the meeting starts at 2.00pm sharp.
Session One 2.00pm - 2.20pm	**Garry McAlister MLA - An update on MLA's priority programs**	MLA's priority programs and opportunities for the Co-Innovation Network to engage.
Session Two 2.20pm – 2.50pm	**Madison Campbell KGF - 'The Hub' Changing how Kilcoy Global Foods interacts with customers and partners**	Innovating how KGF engages with suppliers and customers to build demand for their products.
Break 10 minutes		
Session Three 3.00pm – 3.55pm	**Hargraves Institute** **Making change happen in your business** Your role is a catalyst for change and innovation in the company. It requires a mix of: People skills - Change Management Strategic skills - Scaling	**Interactive presentation** about the concepts **Breakout activity:** Group interviews to discuss implementing change in your organization. **Group debrief:** Report back: what I've learnt about making change happen from the interview
3.55pm – 4.00pm	**Garry McAlister**	**Summary Day 2 / Survey**

Day One Thursday 3rd June 9.00 - 12.00 Noon		
8.45am -9.00am	**Co-Innovation Manager Introductions**	Note: the meeting starts at 9.00am sharp.
Session One 9.00- 9.20am	**Garry McAlister MLA - The Co-Innovation Program into the Future**	Updates to the Co-Innovation program based on feedback from the Network review
Session Two 9.20am-9.50am with questions	**Guest presenter Joel Bentley ACC - 'Leading from Behind' to change behaviour**	Influencing and leading change at ACC's network of farms to capture and use data
Break 10 minutes		
Session Three 10.00-10.55am	**Hargraves Institute** **Workshop** **Collaboration Touchpoints** Your role is an innovation broker… You have to define problems, the research required and the potential solutions by working with your leadership and operations teams other organisations, researchers and MLA. How can you be most effective?	**Interactive presentation** on the role of the Co-Innovation manager, the challenges and collaboration. **Breakout activity:** Your collaboration touchpoints Who do you collaborate with? What about? How do you collaborate? What can you do better? **Group debrief:** What can you do better?
10.55 -11.00am	**Garry McAlister**	**Summary Day 1**

7.2 JBS Independent review : Case Study 6 JBS (Project V.ISC.1933)

7.2.1 Role Type: Digital Marketing Manager

i) **Name:** Matthew Zorzetto
ii) **Agreement Commencement and End Dates:** 25 October 2018 – 1 January 2022
iii) **Employment Terms:** 1 FTE Three-year term
iv) **Incumbent Location:** Queensland

7.2.2 Overview of Partner Organisation

JBS Australia is Australia's largest meat and food processing company and is also part of the global JBS business, which is the largest animal protein business in the world and the second largest food company, with operations in North America, South America, Europe, Australia, and New Zealand. JBS owns and operates 10 processing facilities and six feedlots across Australia, and provides a range of beef, lamb, pork, and value-added branded products. The company owns Australia's largest smallgoods manufacturer Primo Foods, and Andrews Meat Industries, a high-value meat cutting and case-ready production facility. JBS Australia also owns and operates a wholesale division, D.R. Johnston; an international meat and by-products trading business, Swift & Company Trade Group; and are the majority shareholder in the leading automation technology company, Scott Technology. Today, JBS Australia exports to more than 50 countries, while also maintaining a significant market share in the domestic beef and lamb market. In response to decreasing supply, the company has moved away from commodity driven sales to an increased focus on providing niche customised outputs to maximise return on individual carcases.

JBS were the original pilot involved in the MLA Co-Innovation project, and MLA has been working with them on innovation development for the past 9-10 years.

7.2.3 Stated Purpose of Role

The stated purpose of the JBS role is to build expertise and resources within JBS to enhance digital capability, specifically through the provision of advanced analytics of datasets in order to gain new insights for the business. The purpose of the program is to analyse value in linking existing and new company data with other datasets and mining the data in order to generate value and new opportunities. The primary focus of the role is the implementation of the agreed JBS/MLA Digital Strategy across the JBS's business.

The primary goal is to provide support in the form a dedicated Digital Marketing Manager resource to deliver a data capture and analytics processes to allow the Australian Meat and Livestock Industry to define the various processes and required metrics for running red meat value adding production facilities through to the (domestic and export) customer.

7.2.4 Overview of Role Achievements

JBS invested in the co-funded Digital Marketing Manager role to bring some new insights into the way they do business and to increase their digital engagement from a marketing perspective. The

company was also wanting to enhance their ability to take advantage of new opportunities in the digital space. Key achievements of the role to date have included:

- Supported development of a King Island Beef brand traceability system to support the proof of authenticity of locally sourced King Island beef. This is one key initiative to enable JBS to connect with their customers and potentially end users in the supply chain.
- Tailoring an off the shelf enterprise brand management platform to house all of the company's brand assets online and enable JBS customers to use the platform to access and tailor these brand assets for their own marketing activities. This platform ensures high quality and consistent use of brand assets and value adds to customer service. The platform is currently being tested.
- Supporting customers to develop or revise ecommerce trading platforms to increase sales and demand for JBS products.
- Role in driving a JBS project alongside AMPC and Bondi Labs to test a set of smart glasses (Realwear SMT-1) to determine the feasibility of a range of use cases that will provide benefit to JBS through potential cost-savings, but also future proofing the business in the event of visitor restrictions into high-risk operational areas (e.g. caused by COVID-19). A range of use cases has been identified, and the site that has been nominated for the first series of trials is Beef City Plant and Beef City Feedlot. Additionally, a second plant, JBS Brooklyn, has been nominated in the next phase of the project, as a set of the smart glasses have arrived on-site ready for pre-flight checklist and testing of IT infrastructure.
- Establishment of a strong social media presence for JBS through the aussiebeef communication platforms.

The JBS Digital Marketing Manager came into the co-funded role from a background in the financial services industry, and has been able to adapt and build on his existing skills to focus on a new industry. Initially he had to adjust from previously working in a business to consumer type marketing model to the business to business (customer) marketing model that applies for JBS. The company has recognised that in addition to the skills in marketing to customers, more generalist supply chain knowledge is needed to better align the customer end with the production end of the JBS supply chain. A greater focus on developing digital capability and the ability to provide broad data insights across the entire supply chain would greatly assist JBS to build further digital capability to support decision making across the supply chain.

The incumbent has played a key role in informing and upskilling other company staff, particularly in the sales and marketing teams, around digital marketing tools and techniques, and has also supported the digital capability of JBS customers via support provided for development of ecommerce solutions and brand marketing and activities. The incumbent has encountered some challenges around shifting the culture of the organisation more broadly around the use of digital marketing solutions, and of data technology solutions more broadly, however progress is being made toward addressing internal resistance to change among some elements of the company.

The role has around 6 months remaining for the current employment term, and the focus during this period will be on continuing development of current projects including the Smart Glasses project, the brand assets portal and the CRM system. A primary focus in the next phase of role delivery will be Consumer Connect Digital Web Portal - Discovery and Scoping. A detailed scope has been developed and approved by JBS senior management to proceed to the concept build of consumer connect portal, including trialling and customer interfacing. As part of the Consumer Connect Digital Web Portal development, the off the shelf solution will be built and trialled with a pre-selection of customers and end users.